

EXHIBIT D



Dolphin Safe National Survey

Key findings from a national survey of 1,000 adults, including 450 cell phone interviews conducted September 12-17, 2016.

Glen Bolger

Tuna

Nearly one-third of Americans look for the dolphin safe label, while another third do not.

“And, do you look for a dolphin safe label when you buy canned tuna?”^

31%

Yes

32%

No

Top Groups Yes (31%)

New England	50%
Ind Women	41%
White Dem	40%
Mod/Conservative Dem	40%
Women 50+	39%
White Women	38%
Soft/Lean Dem	38%
Dem Women	38%
\$20-\$40K	38%
Pacific Region	38%
Women Without A College Degree	37%
Women <\$60K	37%
West Region	37%
Women	36%
Total Dem	36%
Age 35-44	35%
Age 45-54	35%
Gen X	35%
Women With A Degree	35%
Men \$60K+	35%
Mountain Region	35%

^N=Only 636 of 1000 responded

One-quarter of adults say they specifically inspect canned tuna for the dolphin safe label before purchasing.

"And, do you specifically stop to inspect canned tuna for a dolphin safe label before adding it to your shopping cart?"^

25%

Yes

6%

No

Top Groups Yes (25%)

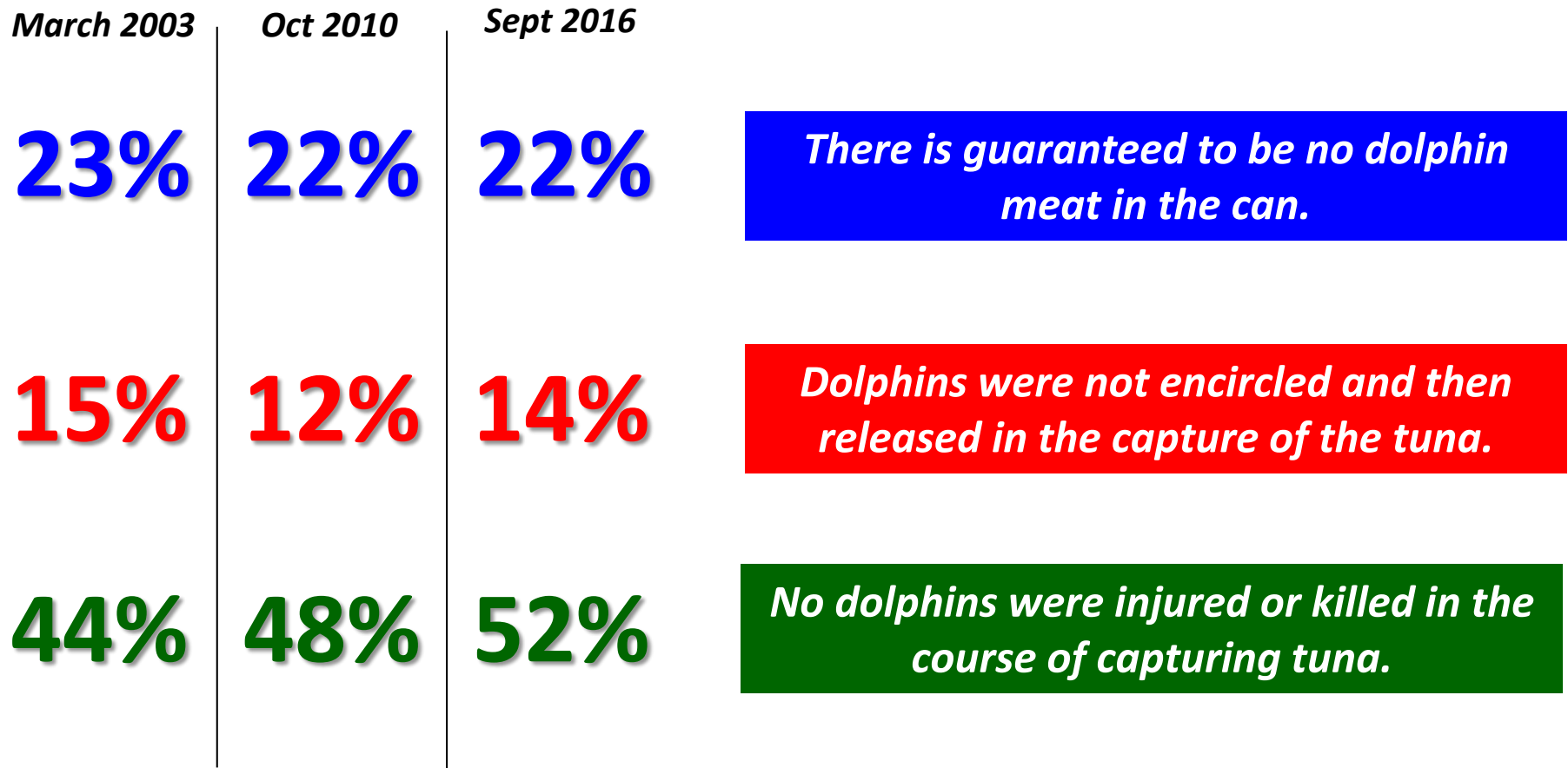
New England	45%
White Dem	34%
Dem Women	34%
Mod/Conservative Dem	33%
\$20-40K	32%
Women 50+	32%
Total Dem	31%
Soft/Lean Dem	31%
Base Dem	31%
Pacific Region	30%
Liberal Dem	29%
Age 45-54	29%
Baby Boomers	29%
Total Liberal	29%
Post-Graduate	29%
Women With A College Degree	29%
Men \$60K+	29%

[^]N=Only 311 responded

Dolphin Safe

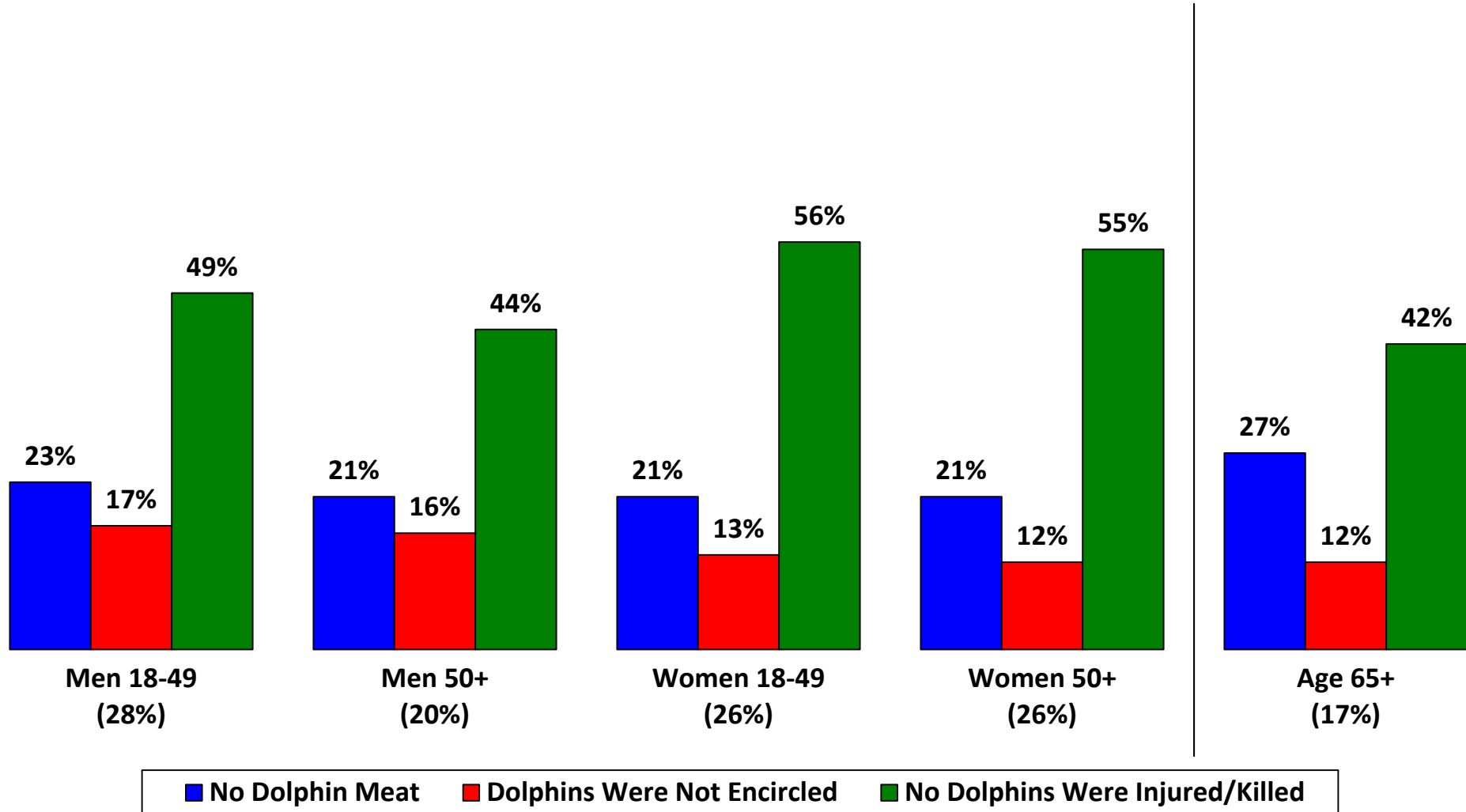
A majority of adults believe that the “dolphin safe” label means no dolphins were injured or killed.

“What do you think the term ‘dolphin safe’ means when it appears on a can of tuna? Do you think it means...”



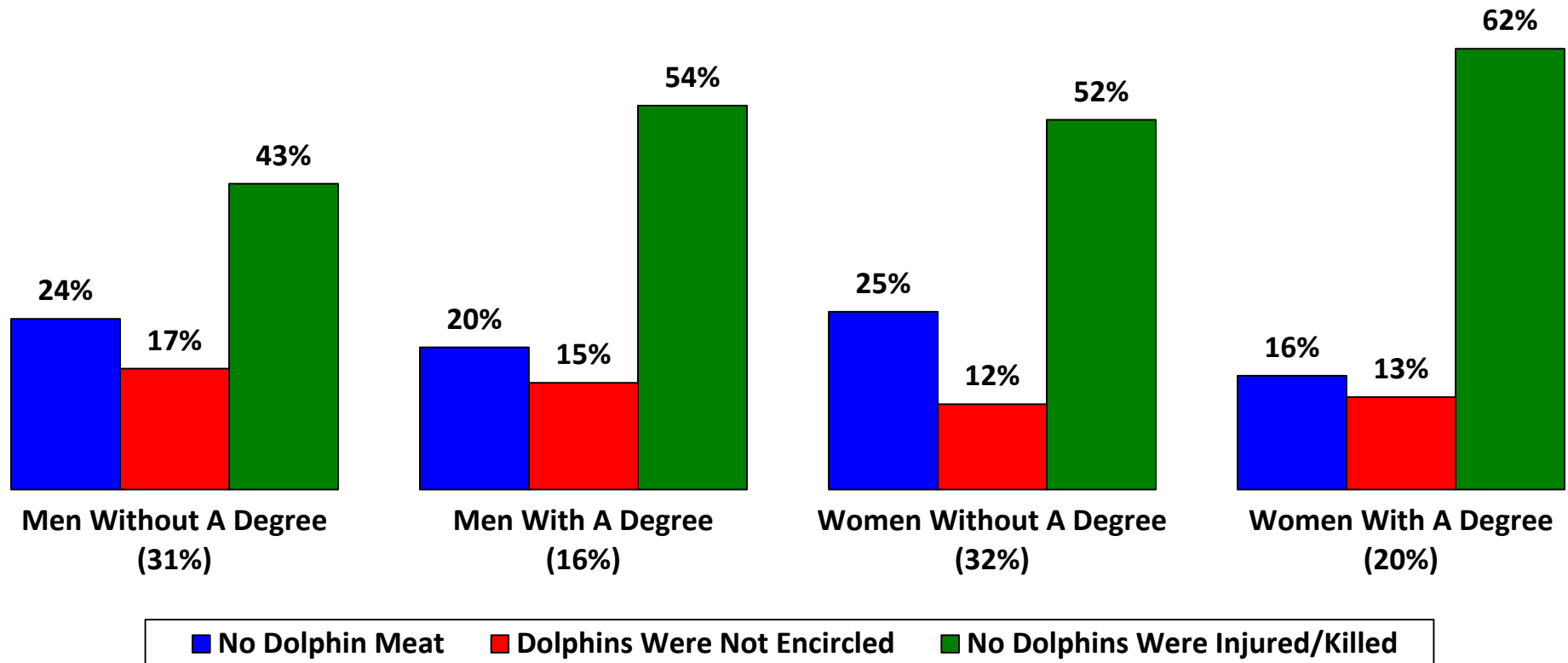
The dominating belief across gender/age groups is that “dolphin safe” tuna means no dolphins were killed/injured.

Dolphin Safe on Can by Gender/Age + Seniors



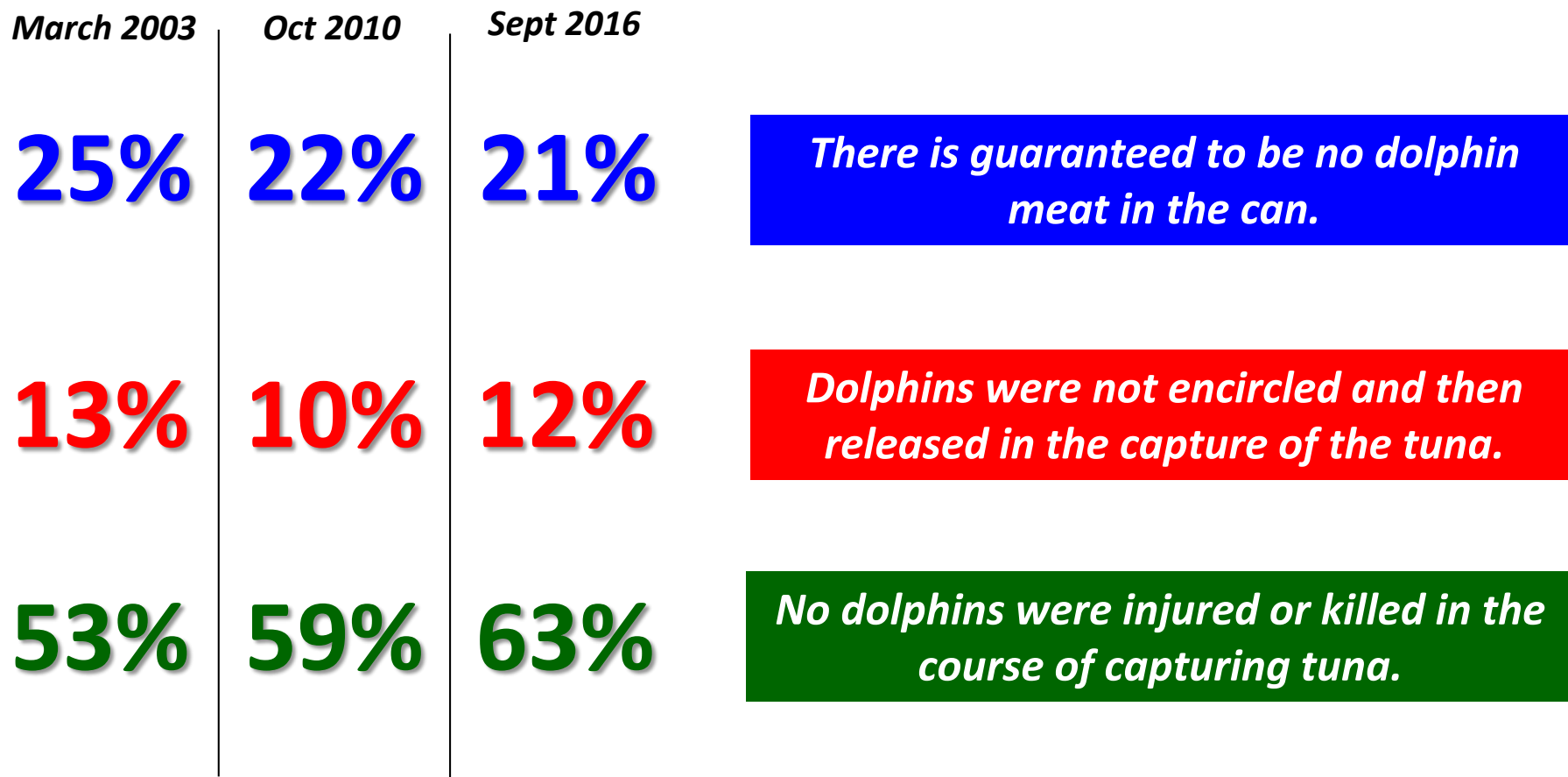
Men without a college degree are the most likely to be uncertain of what the “dolphin safe” label means.

Dolphin Safe on Can by Gender/Education



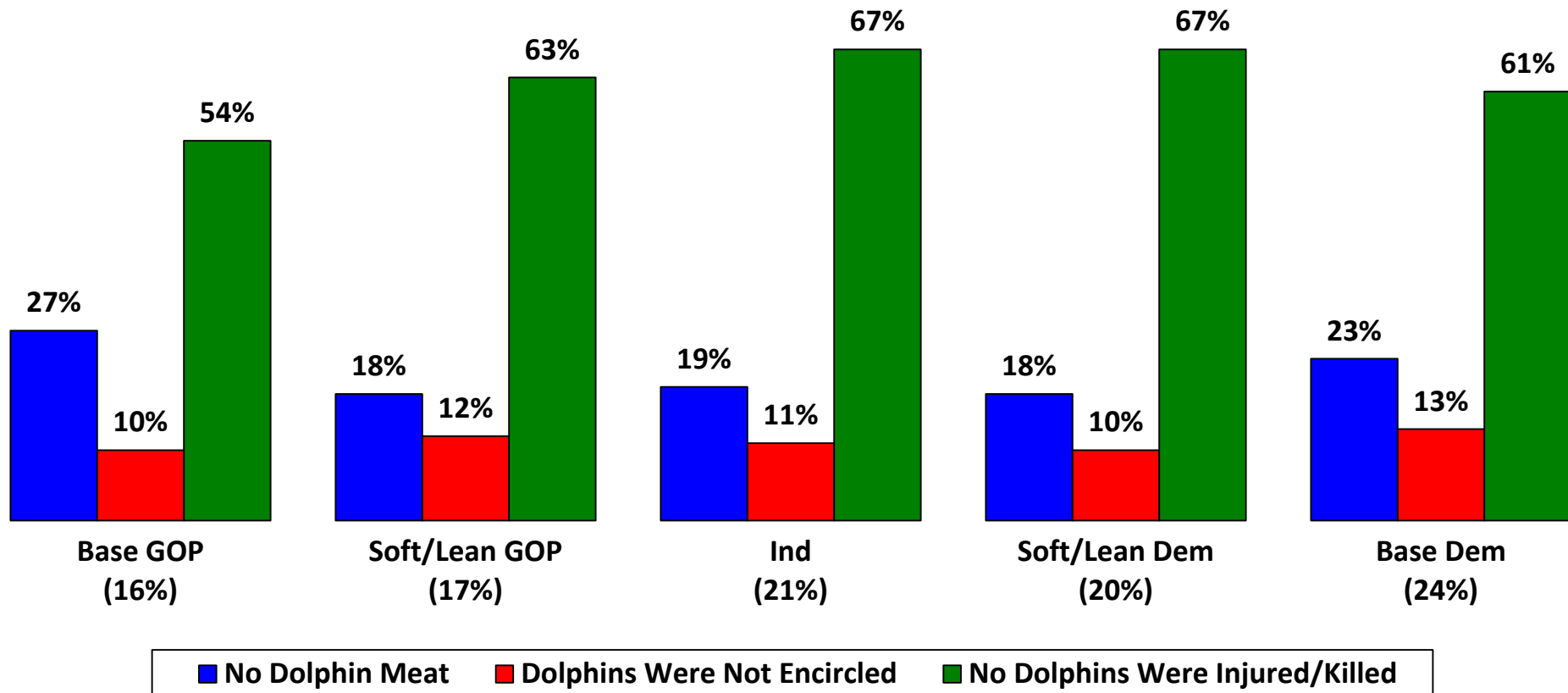
Almost two-thirds of adults think the definition of “dolphin safe” should be that no dolphins were injured/killed.

“Thinking more about this...what do you think the definition of ‘dolphin safe’ should be? Is it...”



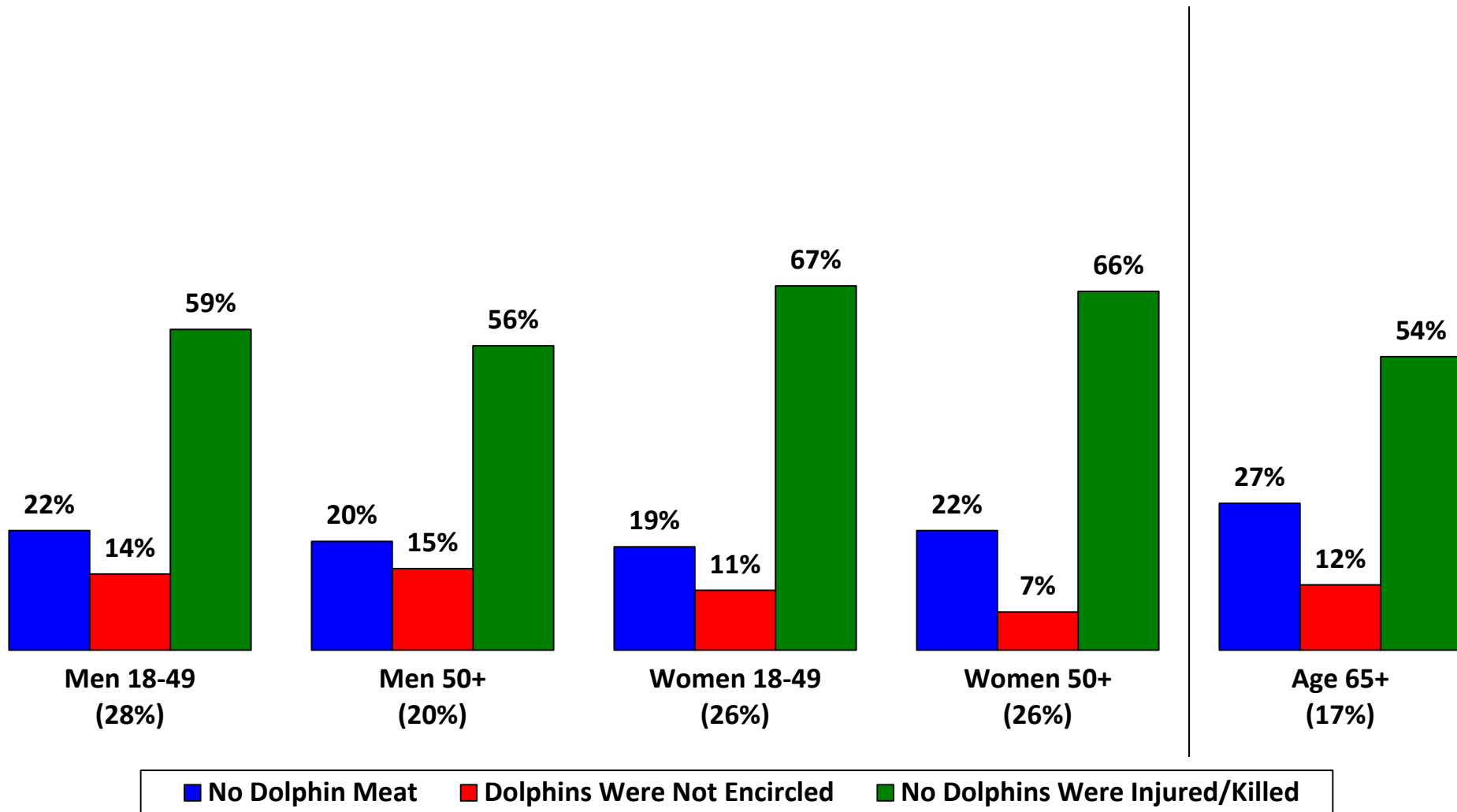
A majority of adults believe that “dolphin safe” should mean no dolphins were injured or killed across party lines.

Dolphin Safe Definition by Party



Seniors are the most likely to believe that “dolphin safe” should mean that dolphins were not encircled.

Dolphin Safe Definition by Gender/Age + Seniors



Two-thirds of adults say that if dolphins are accidentally killed, then the tuna is not “dolphin safe.”

“If dolphins are killed accidentally while the tuna are being caught, by either nets or hooks, would you consider that tuna to be ‘dolphin safe’?”

28%

Yes

67%

No

Top Groups No (67%)

Age 18-24	77%
Liberal Dem	76%
Women With A College Degree	76%
Hispanic	75%
Ind Women	75%
Dem Women	75%
Total Liberal	75%
Women 18-49	74%
White Dem	74%
Millennial	73%
College Graduate	73%
Women <\$60K	73%
Age 25-34	72%
Total Dem	72%
Soft/Lean Dem	72%
Base Dem	72%
\$20-40K	72%
Pacific Region	72%
Gen X	71%
Men \$60K+	71%

Adults overwhelmingly prefer “ocean safe” tuna.

“As you may know, all commercial tuna fishing techniques lead to dolphin deaths. Even fishing for tuna that carries the “dolphin safe” label results in dolphin deaths. With that in mind, which would you rather your grocery store carry on its shelves?”

9%

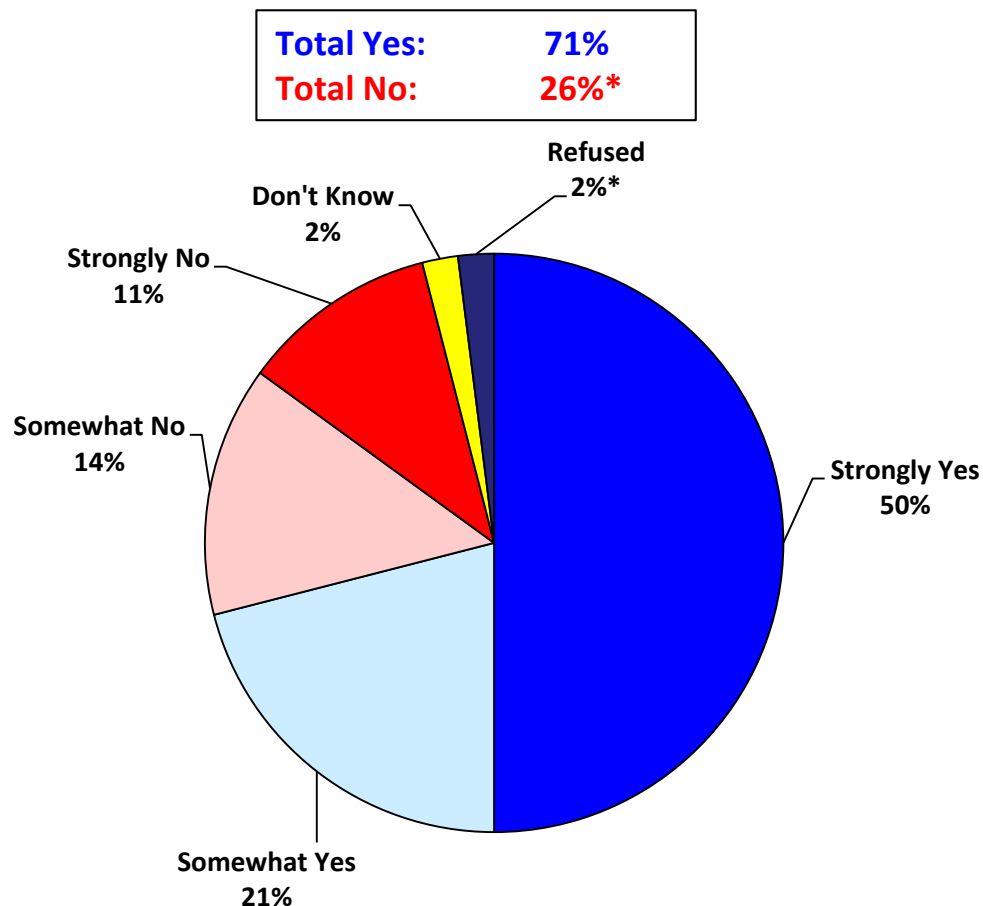
“Dolphin safe” tuna that results in over ninety thousand deaths and hundreds of thousands of shark, ray, and turtle deaths.

79%

“Ocean safe” tuna that results in fewer than one thousand dolphin deaths, with very few shark and ray mortalities, one hundred percent turtle protection, and is better for tuna stocks.

Almost three-quarters of adults say they would feel deceived if they discovered that a dolphin had been injured while capturing tuna.

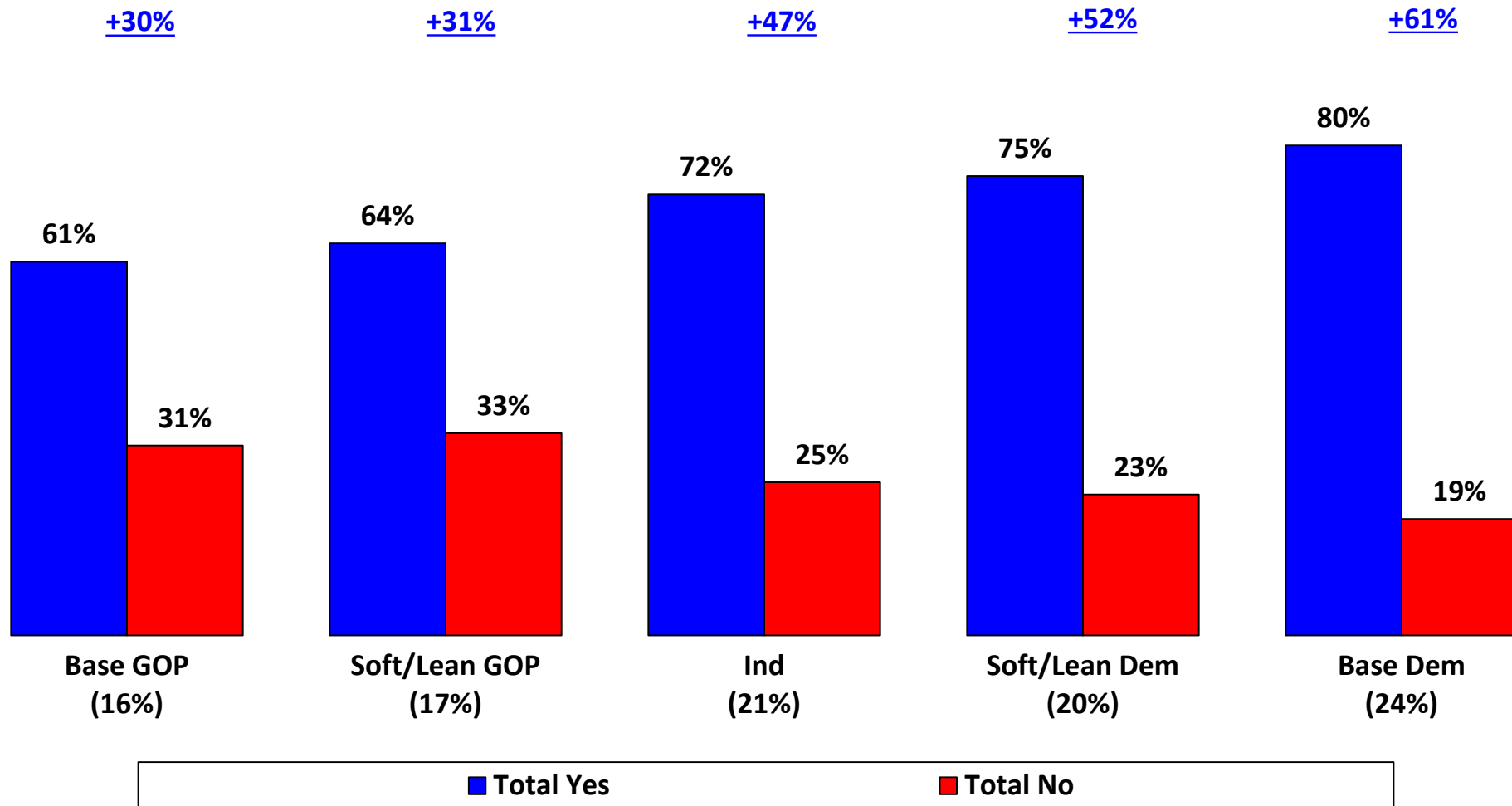
"If you ate a tuna product with the dolphin-safe label and later discovered that a dolphin had been killed or injured when the tuna was caught, would you feel deceived by the label?"



*Denotes Rounding

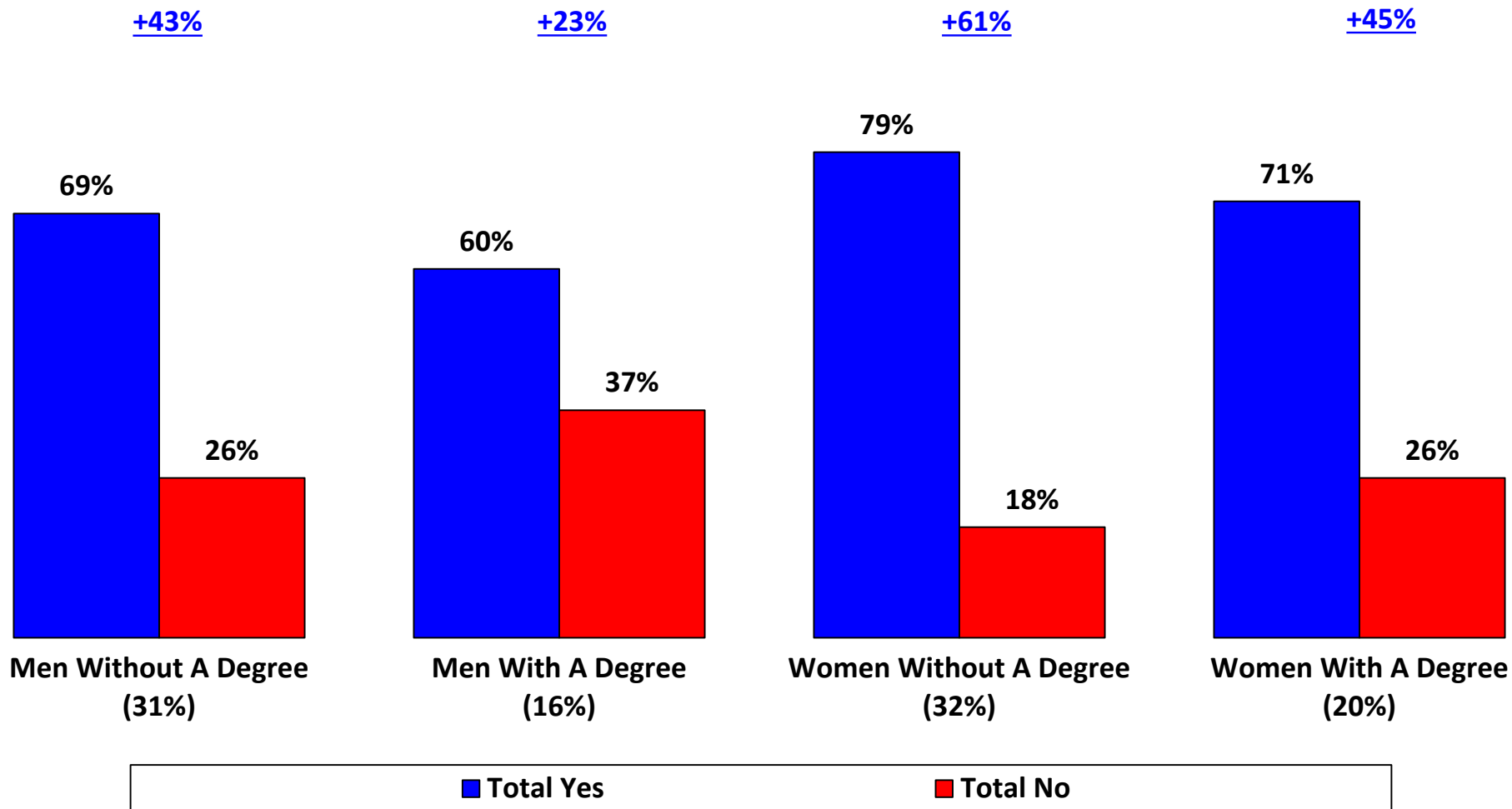
Base GOPers are the least likely to feel deceived by the label, but even a strong majority of that group feels deceived.

Label Deception by Party



Women without a college degree are the most likely to feel deceived.

Label Deception by Gender/Education



An overwhelming number of adults say it is important to have environmentally-sustainable seafood products.

“And, which is more important to you...”

86%

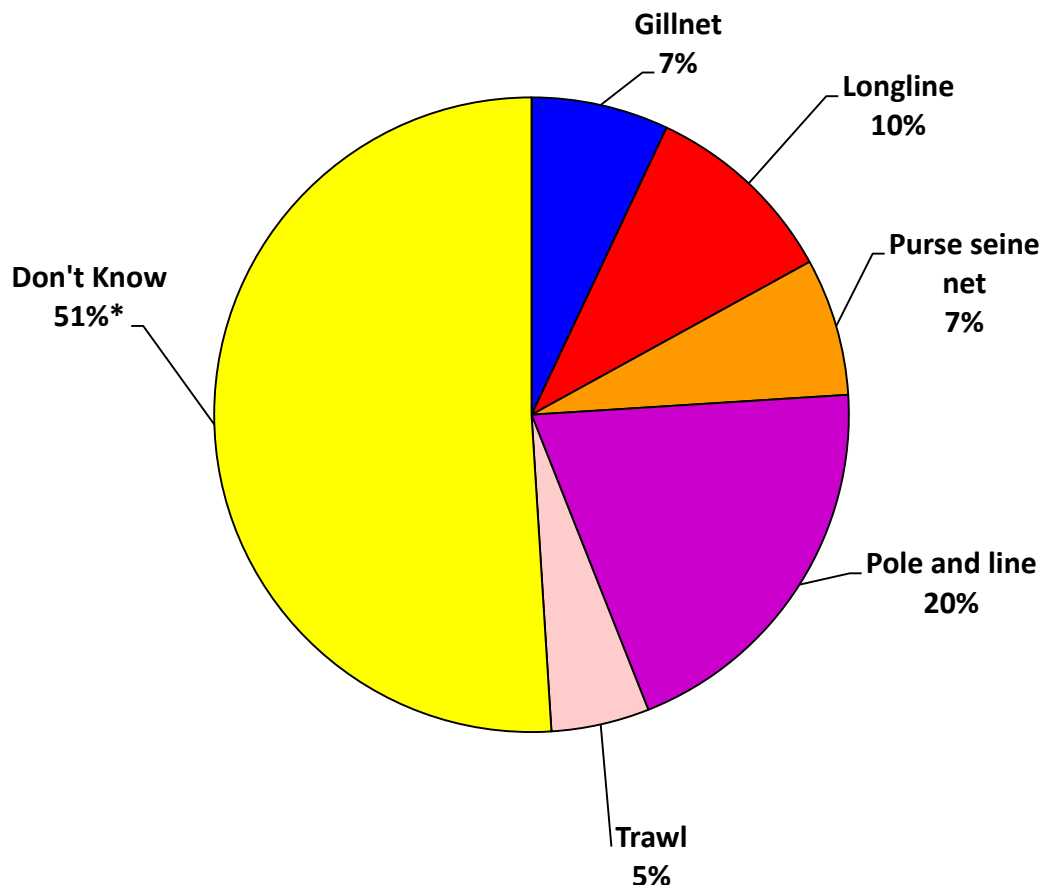
Environmentally-sustainable seafood products, which are those products that ensure the health of the whole ecosystem, including dolphins.

9%

Current “dolphin safe” seafood products, which are those products that only focus on protecting dolphins, sometimes at the expense of other species?

Over half of adults do not know which fishing methods are best for the sustainability of marine life.

“Which of the following fishing methods do you think works well for the sustainability of tuna and other types of marine life?”



*Denotes Rounding

The Bottom Line

THE BOTTOM LINE

Nearly one-third of Americans look for a dolphin safe label, while about the same number do not. The remainder do not purchase canned tuna. Those who are most likely to look for the label are women, particularly Democratic and Independent women.

Of those who look for it, most say they specifically stop to inspect canned tuna for a dolphin safe label.

A majority of Americans believe that “dolphin safe” means no dolphins were injured or killed in the course of capturing tuna. Women are especially likely to believe that.

Americans also increasingly believe that the definition of “dolphin safe” should be that no dolphins were injured or killed in course of capturing tuna. Strong majorities across partisan lines believe that. Women are more likely to believe that than men.

However, two-thirds of adults say that even if dolphins are killed accidentally when tuna are being caught, then the tuna is not dolphin safe. That attitude is particularly high among younger Americans, Democrats, women, and Hispanics.

Accordingly, adults prefer “ocean safe” tuna positioning to “dolphin safe” tuna language. Americans say they would feel deceived by the label if a dolphin had been killed or injured when the tuna is caught. While base Democrats are the most likely to feel deceived, it is not a partisan issue, as even strong majorities of Republicans would feel that way.

Americans feel strongly about protecting the entire ecosystems, not just dolphins. However, they do not have opinions about which type of fishing method is best for the sustainability of marine life.



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For more information about this presentation or about Public Opinion Strategies, please give us a call.